

CHECKLIST

Enterprise Data Management (EDM) Health Check

Data is no longer the sole purview of IT. Businesses must share ownership of data across the organization to leverage its value effectively—that requires good EDM practices.

How Does Your Firm Measure Up?

Are you applying EDM practices to optimize operations, make better business decisions, drive innovation and manage risk effectively?

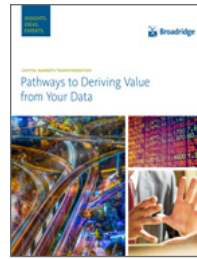
Use this 10-question checklist to assess the health of your firm's EDM practice.

| | Never | Sometimes | Usually | Always |
|--|-----------------------|-----------------------|-----------------------|-----------------------|
| | 1 | 2 | 3 | 4 |
| Data sourcing: Data is accessible and shared across the enterprise. | | | | |
| Do your business groups spend more time looking for data than analyzing it? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Do multiple business groups pay for the same pricing/reference data? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Do you optimize vendor data access/subscription/management to reduce costs? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Value of data: The organization understands data cost vs. quality. | | | | |
| Is your data treated as an enterprise resource? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Does your business feel empowered and confident with the data available? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Are you satisfied with the performance of your data vendors and sources? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Data quality and detail: Data is complete, accurate, detailed, clean and consistent. | | | | |
| Do you have well-defined data governance including dedicated roles with tested resources, policies, procedures and monitoring? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Do your clients complain about erroneous data in reports? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Is your business concerned about financial and reputational impacts resulting from inaccurate reference data? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Are your portfolio managers frustrated by conflicting positions reports? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

How's Your Firm's EDM Health?

If you scored 30 or higher, congratulations! You're already on your way to using data to drive successful business transformation.

If you scored 20 or lower, your firm could benefit from a stronger EDM strategy. Most financial services organizations don't have fully optimized EDM practices.



Whatever your current situation, there's always room for improvement. Learn how effective EDM practices can improve your firm's back office operations, facilitate better decision-making and manage risk more effectively by reading our white paper, "[Pathways to Deriving Value From Your Data](#)."

Your pathway to effective EDM optimization begins here.

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